

Standing Committee on the Delivery of Legal Services (SCDLS) 2009 Year-End Assessment

APPOINTMENTS

1. ***How did the activities of your committee further completion of your committee's charge?***
The activities furthered the administration and governance of SCDLS and all aspects of the charge.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
Recruitment of qualified attorneys from practice areas and settings that would be of benefit to SCDLS: IOLTA funded program with strong pro bono experience, court based self-help center, law school, corporate, government, small firm and moderate income delivery systems. All areas were achieved except for corporate, government and law school.
3. ***How was program success measured?***
Success was measured by the total number of applications received, the number of applications that list SCDLS as first priority, applicants from a variety of practice settings and diverse backgrounds, and the overall quality of each applicant (e.g. demonstrated commitment to the delivery of legal services to low- and moderate-income individuals)
4. ***What type of information has been presented related to the performance measures?***
Qualitative and quantitative.
5. ***What additional information is needed and when can that information feasibly be provided?***
Not applicable.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
Conduct targeted and individualized outreach and recruitment among State Bar subentities in addition to external entities. Continue to interview qualified applicants as part of the evaluation process and if applicant pool lacks qualified applicants, consider holding one or two positions open to continue recruitment efforts.

AWARDS/RECOGNITION

1. ***How did the activities of your committee further completion of your committee's charge?***
Identify, develop and supports improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
The overall number of nominations for President's Pro Bono Service Awards was satisfactory and overall the quality of the nominations was very high; however, there were no nominations in four categories: government, medium firm, small firm or limited active practice. Publicity and outreach for the awards were conducted well in advance of the nomination deadline with targeted outreach to local, minority and women's bar associations, mid-size firms, corporate counsel, law schools and legal services providers.

The number of nominations for the Loren Miller Legal Services Award was unsatisfactory. SCDLS Awards Outreach members are concerned that nominators may be unaware that a Loren Miller

Award candidate can be nominated again (and again) so a concerted effort will be made to include this information in the 2010 nomination materials and when members conduct individual outreach.

There also is concern that it may be quite time consuming to complete the nomination form for either award, especially for short-staffed legal services providers and local bar associations, and that this may contribute to the fluctuation in the number and type of nominations received annually. State Bar staff has converted both forms into fillable Word documents and the forms for 2010 are much more streamlined and user-friendly.

3. ***How was program success measured?***

Success was measured by the quantity and quality of the nominations.

President's Pro Bono Service Awards

The total number of nominations received for the President's Pro Bono Service Awards was 23 in a total of four categories (in 2008 there were 30 nominations in a total of eight categories and in 2007 there were 27 nominations in 6 categories). The nominees were outstanding and very "competitive", especially in the large law firm category.

Loren Miller Legal Services Award

One nomination was received as compared to three in 2008 and nine in 2007.

4. ***What type of information has been presented related to the performance measures?***

Both quantitative and qualitative information.

5. ***What additional information is needed and when can that information feasibly be provided?***

Not applicable.

6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

During 2009, SCDLS reviewed carefully the awards criteria, factors to be considered and categories, and engaged in very thoughtful discussions about the most effective ways to revise the awards so that they are more contemporary and reflect the current pro bono landscape while at the same time preserving the purpose of the awards which is to recognize outstanding pro bono contributions by California attorneys. In November 2009, the Board of Governors agreed with the recommendations put forth by SCDLS to reconfigure the Pro Bono Awards as follows:

- Add law schools, faculty and students as well as associations of California lawyers as possible recipients;
- Clarify factors to consider to include geographic barriers, etc., and
- Change the categories of the awards so as to allow maximum flexibility to honor the most impressive pro bono achievements.

The reconfiguration of the awards will create new opportunities for staff, SCDLS members and the newly formed California Pro Bono Coordinating Committee to promote pro bono throughout the state. Additionally, the nomination form has been reformatted as a fillable Word document so it is more user-friendly and easier to submit electronically. It is anticipated that the changes to the awards and the form will help increase the number of nominations.

TRAINING

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.

- Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

Five MCLE programs were produced, four in conjunction with Practising Law Institute:

- Limited Scope Representation (PLI)
- Unbundling Training of Trainers (PLI)
- Protecting the Rights of Homeowners with Limited Scope Representation (PLI)
- Limited Scope Representation for Legal Services Providers (PLI)
- Creating a Subject Matter Panel – Limited Scope Representation on Homeowners Association Issues

In addition to the unbundling trainings described under Moderate Income, continued updating the Western Center on Law & Poverty's lump sum public benefits manual

3. ***How was program success measured?***

Success was measured by the number of educational programs produced, positive comments from evaluation forms completed by attendees, positive comments by SCDLS members who attended and/or participated in the program, and number of attendees.

4. ***What type of information has been presented related to the performance measures?***

Quantitative and qualitative information presented.

5. ***What additional information is needed and when can that information feasibly be provided?***

No additional information is needed.

6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

Consider future training collaborations with State Bar Sections.

LEGISLATION

1. ***How did the activities of your committee further completion of your committee's charge?***

- Serve as a resource to the Board of Governors in legal services issues of importance to the State Bar.
- Analyze, report to the Board of Governors, and comment where requested by the Board of Governors or the Executive Director, on proposed court rules or legislation directly relating to or impacting the delivery of legal services to poor and middle-income individuals in California.

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

SCDLS provided written comments and/or analyses on the following matters that were referred by legislative counsel—

Judicial Council 2009 Winter Cycle

- W09-01 (Civil: Fee Waiver Rules and Forms)
- W09-05 (Family Law: Domestic Violence Prevention Act forms)

Judicial Council 2009 Spring Cycle

- SPR09-08 (Appellate Procedure: Time for Review of Decisions Regarding Request for Accommodations)
- SPR09-13 (Name Change: Confidential Name Change Rules and Forms)
- SPR09-29 (Domestic Violence: Judicial Education on Domestic Violence Issues)
- SPR09-30 (Domestic Violence: Firearms Relinquishment in Criminal Cases)
- SPR09-31 (Family Law: Child Custody Evaluations)

State Bar Proposed Attorney Search Web Site

3. ***How was program success measured?***
SCDLS responded to all legislative referrals in a timely and thorough manner.
4. ***What type of information has been presented related to the performance measures?***
Not applicable.
5. ***What additional information is needed and when can that information feasibly be provided?***
No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
No changes anticipated at this time.

MODERATE INCOME

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
 - Develop and disseminate educational materials to improve the delivery of legal services to poor and middle-income individuals in California.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
 - Presented five unbundling trainings
 - Participated in the planning of the State Bar LRS Forum on October 2
3. ***How was program success measured?***
Success was measured by positive comments from evaluation forms completed by attendees, positive comments by SCDLS members who attended and/or participated in the program, and number of attendees.
4. ***What type of information has been presented related to the performance measures?***
Quantitative information was provided.

5. ***What additional information is needed and when can that information feasibly be provided?***
No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
Consider additional partners, venues and themes for unbundling programs.

PRO BONO

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
 - Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals.
 - Develop liaison relationships with other State Bar entities concerning legal services issues of importance to the State Bar
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
 - Continued to participate in two working groups, Best Practices and Family Law, that were formed out of the 2008 Pro Bono Summit, and helped develop a pro bono domestic violence training in conjunction with PLI on October 21.
 - Partnered with the Public Interest Clearinghouse to hold the second Pro Bono Summit that brought together experienced pro bono practitioners from legal services programs, and large law firms, plus representatives from law schools, the courts and small firms for a day of strategic planning on October 8, 2008.
 - Continued to participate in the Access to Justice Commission's Pro Bono Task Force.
 - Participated in the Bay Area planning group for the first National Pro Bono Week Celebration.
 - In late 2009, began initial discussions for the proposed statewide pro bono committee, a joint effort of SCDLS and the Access to Justice commission.
3. ***How was program success measured?***
Positive comments and evaluations received from stakeholders will help measure the quality, usefulness and effectiveness of programs and activities.
4. ***What type of information has been presented related to the performance measures?***
Qualitative information.
5. ***What additional information is needed and when can that information feasibly be provided?***
No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
One of the outcomes of the second Pro Bono Summit is that in the fall 2010 there will be a Pro Bono Conference instead of a summit which has implications for SCDLS activities.

PUBLICATIONS

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
 - Serve as a resource to the Board of Governors in legal services issues of importance to the State Bar.
 - Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals.
 - Develop liaison relationships with other State Bar entities concerning legal services issues of importance to the State Bar.

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

Updating of Western Center on Law & Poverty lump sum public benefits manual continues.

3. ***How was program success measured?***

Not applicable.

4. ***What type of information has been presented related to the performance measures?***

Not applicable.

5. ***What additional information is needed and when can that information feasibly be provided?***

Not applicable.

6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

Materials should have limited print run in light of wider access to information in electronic format.

STRATEGIC PLANNING

1. ***How did the activities of your committee further completion of your committee's charge?***

Furthers all aspects of the committee's charge.

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

2000 accomplishments were evaluated and discussion of 2010 activities and projects began before the end of the 2008-2009 committee year.

3. ***How was program success measured?***

Tasks were completed.

4. ***What type of information has been presented related to the performance measures?***

Not applicable.

5. ***What additional information is needed and when can that information feasibly be provided?***

Not applicable.

6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

No changes anticipated.